

**OFFICERS AND
DIRECTORS**

Peggy Javery CGFM
President
426-5125

James J. Julian, CGFM
President-Elect
426-0400

Gary Millet, CGFM, CPA
Treasurer
426-0162

Mary Herbert, CGFM, CPA
Secretary
243-4059

Babette Haines
Membership
426-5443

Fay Wilson, Warren Wilson, CGFM
Co-Editors
426-5143, 426-1095

Marcie A. Tureaud, Chris Cutitto, CPA
Education, Co-Chairs
426-5367, 426-6102

Pamela B. Lincoln, CGFM
Meetings
255-4664

Barbara Carmon
Programs
426-0170

Dawn B. Wagener, CGFM
Historian
243-4058

Wilbert Antoine, CGFM, CPA
Publicity
525-0754 x218

Jill Byrd, CPA, Pat Hanks, MBA
Public Service, Co-Chairs
426-5465, 426-0204

Debbie Conway-Fikes, CPA
Awards
426-0161

Ronald J. Parent, CGFM, CPA
Immediate Past President
Web Site Coordinator
426-1080

Marcia Curole, CGFM, CPA
CGFM Director
426-1020

DINNER MEETING

Tuesday, March 22, 2005

STEVE J. THERIOT, CPA

The Legislature appointed Steve Theriot as Louisiana's fourth Legislative Auditor on April 20, 2004. Steve resides in Marrero, Louisiana. He is married to the former Gwendolyn E. Dunn and has three children.

Steve received an Associate Degree in Electrical Engineering from Delgado Community College and a Bachelor of Commercial Science degree from Loyola University. He is a Certified Public Accountant and is a member of the American Institute of Certified Public Accountants, the Society of Louisiana Certified Public Accountants, and the Institute of Management Accountants.

Steve has been the sole proprietor of an accounting firm since 1974. He was a member of the Jefferson Parish Home Mortgage Authority from 1979 to 1982; a member of the Jefferson Parish School Board from 1983 to 1987; Louisiana State Representative for the 84th House District from 1988 to 1996; and a member of the Board of Directors of the West Jefferson Medical Center from 1997 to 2002 and Chairman of that medical center from 2002 to 2004. As a member of the House of Representatives, Steve served on the following committees: Ways and Means; Health and Welfare; Municipal, Parochial, and Cultural Affairs; Louisiana State Bond Commission; and the Louisiana Joint Legislative Budget Commission. He was past Chairman of the Ways and Means Committee and the Fiscal Affairs and Governmental Operations Committee of the Southern Legislative Conference.

Presentation will qualify for one hour of professional education credit.

PRESIDENT'S MESSAGE

Dedicated to Advancing Government Accountability

"The price of success is dedication, hard work, and an unrelenting devotion to the things you want to see happen." –Frank Lloyd Wright, Architect

The quote above describes the 2004-2005, New Orleans Chapter Executive Committee commitment to our members. We are forward thinking and steady in our course of actions. The New Orleans Chapter is carrying out the mission of AGA, which is to be an educational organization dedicated to the enhancement of public financial management and the advancement of government accountability.

February's meeting at Doug's Restaurant was timely and addressed a current topic government agencies face daily. Mr. Edgar Chase, CPA, gave a well-documented and informative presentation, "Risk Management In A Cyberspace Environment, An Auditor's Perspective". Mr. Chase's message emphasized the risks in a computer operated environment and counter-measures to avoid the inherent vulnerabilities earning members one continuing professional educational (CPE) credit.

As we head into March, we are full speed ahead, with the Second Annual Shared Government Management Symposium co-sponsored by the New Orleans Federal Executive Board. Seven CPEs can be earned on Wednesday, March 9, by attending and learning about Performance Measurements, President's Management Agenda, Best Practices, Sarbanes-Oxley and much more. There is still time to register for only \$99! On-site registration is available at the Sheraton Hotel beginning at 7:30 a.m.

The AGA Audio Video Conference was held on March 2, titled, "Why Inadequate Internal Controls Lead to Fraud." What an opportunity for

professional development offered to members and non-members at no cost! The New Orleans Chapter paid the audio conference fee so that our members could attain two additional CPEs.

On March 10, the New Orleans Chapter is co-sponsoring with the National Finance Center's Human Resources Office an educational event for members and non-members on a final update of the 2004 tax changes. This cost-free session is one of the outreach activities we are pleased to offer.

Our March 22, meeting at Five Happiness restaurant promises to be another top rated presentation from Steve Theriot, State of Louisiana's Legislative Auditor. Mr. Theriot's subject will provide one hour CPE. At this meeting with the American Society of Women Accountants (ASWA), you don't want to miss the awarding of our annual scholarship to Tanika Casson. She is a junior at Dillard University. She has a 3.8 GPA in accounting and is currently taking 21 credits this semester. She is involved in several organizations.

Dedicated to "Advancing Government Accountability" is summed up in educational opportunities and implementing best practices. We are reaching beyond expectations to partner with organizations promoting our mantra. I only say to you, advance your New Orleans Chapter by attending these programs and encourage membership that is the lifeblood of the organization.

I thank all of the members and officers, who take time out of their schedules to plan, organize, publicize, and attend these events.

Peggy Javery, President, MPA, CGFM

AGA'S JANUARY & FEBRUARY MONTHLY MEETINGS

Minutes from the January 20, 2005 Meeting

Peggy Javery, CGFM, President, called the meeting of the New Orleans Chapter of the Association of Government Accountants to order at 11:43 a.m. in the cafeteria of the National Finance Center in New

Orleans, Louisiana. She asked everyone to join in the recitation of the Pledge of Allegiance, and then Jim Julian gave the invocation.

Ms. Javery introduced the head table and asked everyone to introduce himself or herself to someone that they did not already know. She then introduced her special guests, John Brewer and Charles Wallace from the National Finance Center.

Ms. Javery announced a training event, which would be held on March 9, 2005, 2nd Annual Shared Government Management Symposium.

Ms. Javery then introduced Jill Byrd, one of the Public Service Chairs and Marty Curole. Ms. Byrd thanked everyone for participating in the New Orleans Mission drive with food and cash. She read a thank you letter from the New Orleans Mission. She also reminded everyone that the WYES auction will be coming up in March and that volunteers would be needed. Ms. Curole acknowledged the Children's Hospital collection of teddy bears. She said that over one hundred stuffed animals were collected. Ms. Javery thanked all for Toys-for-Tots program contributions during the holidays and especially Linda Lewis and Monique Banks for coordinating AGA's participation. Wilbert Antoine, CGFM, CPA, Publicity Chair announced a request from the New Orleans Outreach Mission. He said the Mission is seeking volunteers to help with tutoring Orleans Parish school children while preparing for the math portion of the LEAP test.

Babette Haines, Membership Chair, introduced several new members.

After a delectable lunch, Ms. Javery introduced Barbara Carmon, Programs Chair, who presented the speaker, Henry "Hank" Padeletti, Senior Tax Specialist for Taxpayer Education and Communication for the Small Business/Self-Employed Division of the Internal Revenue Service. Mr. Padeletti spoke on tax law changes for 2004. After his presentation, there was a brief question and answer session. Ms. Carmon thanked Mr. Padeletti and presented him with a gift of appreciation.

Ms. Carmon announced that the next meeting would be held on February 17th at Doug's

Restaurant in Slidell. She also stated that the March meeting would be on the 24th at Five Happiness with ASWA, and the April meeting would be on the 21st in La Place with the Baton Rouge Chapter of AGA.

Having no further business, Ms. Javery adjourned the meeting at 1:10 p.m.

Minutes from the February 17, 2005 Meeting

Peggy Javery, CGFM, President, called the meeting of the New Orleans Chapter of the Association of Government Accountants to order at 6:15 p.m. at Doug's Restaurant in Slidell, Louisiana. She asked everyone to join in the recitation of the Pledge of Allegiance, and then Shelda Melancon gave the invocation.

Ms. Javery thanked members and guests for attending, with special recognition given to Jerry Lohfink, Director of the National Finance Center, John White, Deputy Director of the National Finance Center, and Clyde McShan, II, of Savantage Solutions and former National President. She then introduced the head table.

Ms. Javery announced the March 9, Symposium and reviewed the agenda. She said everyone should have received an agenda package, which included the registration form. Ms. Javery stated that sponsor opportunities still exist.

Ms. Javery recognized new members Andrew Case and Amy Marino.

Ms. Javery then introduced Jullin Renthrope, CPA, CGFM, CFE, CGFO, and last year's National President. Mr. Renthrope stated that the Association of Governments is making a difference in government accounting. He then announced that Peggy Javery, this year's President of the New Orleans Chapter would be the Regional Vice President for our region next year. After that, Mr. Renthrope announced several upcoming projects and events from National, including the hiring of a public relations firm, the service efforts and accomplishments project, the annual performance and accountability report, the PDC to be held July 10-13, 2005 in Orlando, Florida, as well as many others.

After a delicious dinner, Ms. Javery introduced Barbara Carmon, Programs Chair, who presented the speaker, Edgar Chase, III, MBA, CPA, JD, Dean of the Business

Division at Dillard University. Mr. Chase spoke on Risk Management in Cyberspace from an Auditor's Perspective. After his lecture, there was a brief question and answer session. Ms. Carmon thanked Mr. Chase and presented him with a gift of appreciation.

Ms. Javery pulled the winner of the 50/50 raffle, John White who won \$16.00.

Ms. Javery reminded everyone again about the Symposium on March 9th, and recognized many of the officers for their work on the meetings and upcoming training event. She also thanked Marcie A. Tureaud, one of the Education Chairs, for her work on the Symposium.

Gerry Knepp asked for volunteers for the telephones for WYES on Wednesday, March 16, 2005 from 6:45 p.m. to 9:00 p.m.

Having no further business, Ms. Javery adjourned the meeting at 8:15 p.m.

SUBMITTED BY /s/ Mary E. Herbert, CPA, CGFM, Secretary

CGFM NEWS

NEW!!! Chapter Recruitment Scholarships Available!!!

AGA's National President, Bobby A. Derrick, CGFM, has challenged every member to recruit at least 1 new member into AGA before the close of the membership year, April 30, 2005. And, he also challenged AGA Leaders to do even more—to recruit five new members each before the close of the membership year. Have you accepted the challenge?

With just about 3 months left in the 2004-05 membership recruitment campaign, we still have a ways to go to reach President Derrick's challenge. Did you know that on the membership application we ask new members where they heard about AGA? And did you know that the number one

answer continues to be from a friend/co-worker? This means you!

This is where the **Chapter Recruitment Scholarship Program** comes in...we are talking outside of the box, breaking new territory here. We are offering funds to each chapter to use for recruiting events. Your chapter could use the money to hold a pizza party at an agency's office – invite the staff and discuss what the chapter has to offer them (i.e., low cost CPE, leadership training, community service, social events, etc.). Or your chapter could sign up for an upcoming audio conference, use the funds to purchase refreshments and invite a bunch of non-members to participate. Or your chapter could hold an early career breakfast and invite non-members to participate. The possibilities are endless. [Click here](#) to see a list of ideas!

Okay, so how does the program work? If your chapter would like to request the recruitment funds, please send an email to Susan Fritzlen at sfritzlen@agacgfm. Requests need to be made via email before March 10th. Funds will be dispersed immediately to your chapter. Then it is up to the chapter to hold the recruiting event (s) before April 30th. Sometime in May, each chapter will be asked to submit the recruitment activity they conducted with the funds. Then, we'll compile the information and share it with all chapters. We hope to end up with a large list of recruitment best practices!

Remember, recruitment is 24x7 and we are all walking spokespersons for AGA! Lets all *spring* into action with the **Chapter Recruitment Scholarship Program!**

Annual Renewal Update

Annual renewal packages have been mailed this week and are due to be paid by March 31, 2005. Invoices include both membership and CGFM certificate renewals where applicable.

Again this year we have included a member *Information Sheet* in the renewal packages (demographic and contact information). Please encourage all members to fill this out and submit to AGA.

The quickest way to renew is online via the password protected members-only section of the AGA website. *How to Renew Online:* Access the AGA website at www.agacgfm.org Click on 'Members Only' on the left palette. Login using your membership ID number

and password (your first initial followed by your last name – no spaces), click on the gray ‘billing’ button above your name (if the gray billing button doesn’t appear, it means that your membership is paid in full). All you have to do is input your credit card information and hit ‘Submit.’ The transaction will automatically process via our secure server and the renewal information will be automatically updated in AGA’s in-house membership system. While you are logged into the Members Only section, be sure to take a look at your contact information and make any updates as necessary (especially your email address).

Louisiana Allows CGFM Exams to Count as CPE

It was GASB 34 that drove Marco Bodellini, CPA, to earn his CGFM designation, but it was his own “squeaky wheel” approach that got him CPE hours for his efforts. He decided to study for the CGFM Examinations to get a better understanding of the new financial reporting model for state and local governments. During the process, he sent an e-mail to the State Board of Certified Public Accountants of Louisiana, which approves appropriate CPE for CPAs, and found out that sitting for the CGFM Exams would not earn him CPE hours, even though CPE is granted for taking other certification exams. He talked to other CPAs. “I said, ‘I can’t believe they don’t have it covered. Let’s get the board to approve it.’ It’s not just for me, it’s for everybody else who wants this designation.”

[Click here to read the entire article.](#)

MEMBERS INFORMATION

Member information can be updated directly into the National AGA database by logging in with your Name and Member ID number. Log into AGA’s website at <https://www.agacgfm/> to renew membership, update personal information such as phone and address changes.

Please share news about yourself or other AGA members. Contact Warren Wilson at 426-1095 or e-mail to warren.wilson@usda.gov

COMMUNITY SERVICE

We need your help!! WYES-TV has asked us to help with their March 2005 Membership Drive on Wednesday night, March 16, from 6:45 p.m. until 9:00 p.m. We need approximately 10 members to help with this event. Volunteers will function on the telephone bank taking pledges from home viewers.

This event will be relaxed, fun, and WYES provides meals, snacks, drinks, and door prizes. Please participate in this event and help keep WYES-TV’s quality programming on the air. If you want to participate, please contact Gerry Knepp (504-426-5463).

LOCAL/NATIONAL CALENDAR OF EVENTS

March 9, 2005 - 2nd Annual Shared Government Management Symposium (New Orleans)

July 10-13, 2005 – 54th Annual Professional Development Conference & Exposition (Orlando)

RECOGNITION POINTS

Recognition Categories	Max Credits Per Category	Credits Through Dec. 2004
Communications	3,000	5,175
Membership	3,000	850
Community Service	2,000	2,325
Awards	1,000	1,000
Chapter Leadership, Planning Participation	3,000	2,500
Education & Professional Development	4,000	3,600
Certification	4,000	2,650
Total	20,000	18,100

CALENDAR OF EVENTS

Date/Time	Location	Event	CPE
April 21, 2005 5:30 pm. Social 6:00 pm. Dinner	Bull's Corner 1036 W. Airline Hwy Laplace, LA	Joint Meet With Baton Rouge AGA Nat'l President Bobby Derrick	No
May 13, 2005 6 pm – 9 pm	Green Acres C. Club W. Napoleon @ Transcontinental Metairie, LA	Crawfish Boil/Awards Ceremony	No
June 2005	Zephyr's Stadium 6000 Airline Highway Metairie, LA	Zephyr's Baseball Game/Tailgate Party	No

**NEW ORLEANS CHAPTER
ASSOCIATION OF GOVERNMENT ACCOUNTANTS**

**STATEMENT OF NET
ASSETS**

February 28, 2005

ASSETS

CURRENT ASSETS:

Cash	\$1,170.66
Investments	7,193.69
Deposit - Restaurants	<u>100.00</u>

TOTAL ASSETS	<u><u>\$8,464.35</u></u>
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**LIABILITIES AND NET
ASSETS**

Accounts Payable	<u>.00</u>
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NET ASSETS:

Unrestricted net assets	<u>\$8,464.35</u>
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TOTAL LIABILITIES

AND NET ASSETS	<u><u>\$8,464.35</u></u>
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**STATEMENT OF REVENUES,
EXPENSES**

For 8 months ended to February 28, 2005

OPERATING REVENUES

Education/Training	\$ 00.00
Business Meetings	3,737.42
50/50 Raffle	127.00
Membership Dues	733.00
Donations	874.00
Interest Income	<u>32.68</u>
Total operating revenue	<u><u>\$5,504.10</u></u>

OPERATING EXPENSES

Education/Training	160.16
Business Meetings	4,431.64
50/50 Raffle	63.00
Postage/Supplies/Gifts	225.06
Crawfish Boil	00.00
Bank Service Charges	00.00
Scholarship Winner	00.00
Donations	734.00
Officer Awards	<u>67.37</u>
Total operating expenses	<u><u>\$5,681.23</u></u>

OPERATING INCOME (LOSS)	(\$177.13)
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**NONOPERATING REVENUES
(EXPENSES)**

NONE

**INCOME (LOSS) BEFORE
CONTRIBUTIONS**

(\$177.13)

CHANGE IN NET ASSETS

(\$177.13)

**NET ASSETS AT BEGINNING
OF PERIOD**

\$8,641.48

**NET ASSETS AT END OF
PERIOD**

\$8,464.35



*P.O. Box 29186
New Orleans, LA 70189-0186*

PLEASE EXPEDITE Please contact Babette Haines (504-426-5443) with address corrections.
TIME VALUE MATERIAL

What: Dinner Meeting
When: Tuesday, March 22, 2005
Time: 5:30pm Social/Cash Bar
6:00pm Dinner
Cost: \$24 – Members, \$27 - Guests

Where: Five Happiness (Imperial Room)
3511 N. Carrollton Ave.
New Orleans, LA
Drink: Iced tea or Soda

Menu: There will be circular tables with a Lazy Susan set-up at each table with the following:

Appetizers

Chicken & Corn Soup
Egg Rolls
Shrimp Toast

Entrees

Pecan Shrimp (a favorite!)
Sweet & Sour Chicken
Triple Dragon in Garlic Sauce
Mongolian Beef
Combination Fried Rice

Dessert - Almond & Fortune Cookies

Please pre-register with Pam Lincoln, pamela.lincoln@nfc.usda.gov, (504) 255-4664, and pre-pay Gary Millet, gary.millet@usda.gov, (504) 426-0162, no later than COB on Thursday, March 17, 2005.

To mail a payment, send to: Attention - Gary Millet, National Finance Center/Building 350; P.O. Box 60000; New Orleans, LA 70160